



2018 ARIZONA GOVERNOR'S CONFERENCE ON TOURISM

CHINA MARKET BRIEFING



OVERVIEW & CONTENTS

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GLANCE AT 2017 CHINA MARKET

CHINA MARKET SIZE

- 2017 population: 1.38 billion, up 0.43%
- 18.7% of the world's population
- 58% urban-up from just 26% in 1990

CHINA's GDP GROWTH

- 6.8 % growth in 2017
- Beat market expectations of 6.7%
- Well above official target of 6.5%
- 2018 growth target: 6.5%

CHINA RETAIL MARKET _ *New!!*

- China's retail market was smaller than the USA in 2015 but now rapidly pulling away
- 2017 China e-commerce sales: \$1.1 trillion, nearly half of worldwide ecommerce
- E-commerce accounts for 23% of all China retail sales
- Projected to increase to 41% by 2021
- 75% of e-commerce sales via mobile

RISING DISPOSABLE INCOMES:

- China Disposable incomes grew 7.8% in 2016 and *7.5% in 2017* *New!!*
- Upper middle & high-income class set to make up 30% of the population by 2030, triple today's level

CHINA MARKET UPDATE



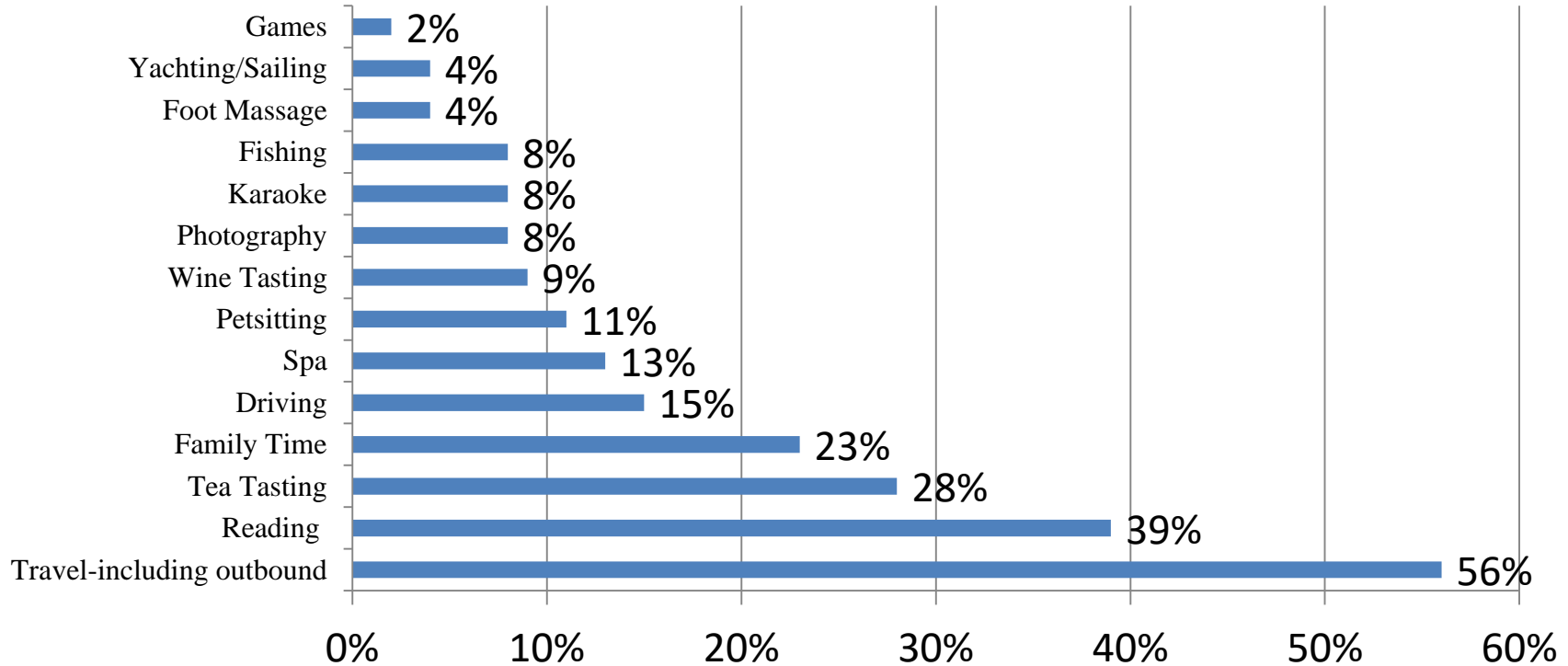
Chinese Outbound Travel to U.S.

- **2009:** half a million Chinese visitors
- **2010:** up 53%
- **2011:** pass the million mark for 1st time
- **2012:** 30%+ increase
- **2013 & 2014:** growth still above 20%
- **2015:** first time growth dips below 20%
- **2016:** end of Golden Decade of growth

THE USA RANKED #1 IN 2017 FOR INTENT TO TRAVEL

2017 Ranking	Destination	Percentage of Chinese Travelers
1	USA	18%
1	France	18%
3	Australia	16%
3	Canada	16%
5	Germany	12%
6	Maldives	11%
7	Japan	10%
7	New Zealand	10%
7	Singapore	10%
7	Thailand	10%
7	UK	10%

Preferred Leisure Activities of China's Upper Classes



Source: Brand USA research

Chinese Overseas Travel Expenditures

2015

Continued to soar an additional **23%**

48% of Chinese outbound tourists indicate they plan to increase travel spend

60% will spend over **\$1,500** for each trip

2016

China overtakes the U.S. as the **#1 BUSINESS** travel market in the world, generating 20% of global business travel spend

Overseas tourism spend reaches **\$242 billion**, up **20%** over 2015 level

2017(f)

Spending reaches a new high of \$266 billion, up 10%
Shopping spending while abroad decreases while spending on entertainment, culture, experiences and healthy-lifestyle products soars

By 2020, Overseas spending is expected to reach \$ 429 billion

New China-U.S. Flight Launches in 2018

Destinations	Routes	Airlines	Frequency	Remarks
Los Angeles	Xiamen-Los Angeles	Tianjin Airlines	3X Weekly	Plan in December
	Zhengzhou-Los Angeles	Tianjin Airlines	3X Weekly	Plan in December
Atlanta	Shanghai-Atlanta	Delta Airlines	Daily	Launch in July
Boston	Chengdu-Boston	Sichuan Airlines	3X Weekly	Launched in May
Chicago	Chengdu-Chicago	Hainan Airlines	3X Weekly	Launched in June

Source(s): Airlines

China Airlift to the U.S.

16 China Non-Stop Gateways to the U.S

Current

- Beijing
- Shanghai
- Guangzhou
- Chengdu
- Wuhan
- Nanjing
- Hangzhou
- Changsha

New

- ✓ Shenyang
- ✓ Shenzhen
- ✓ Qingdao
- ✓ Fuzhou
- ✓ Chongqing
- ✓ Jinan
- ✓ Tianjin
- ✓ Zhengzhou(new2018)

14 U.S. NON-STOP GATEWAYS TO China

- Los Angeles
- San Francisco
- New York
- Honolulu
- Seattle
- Washington D.C.
- Boston
- Las Vegas
- Chicago
- Houston
- Dallas
- Detroit
- Saipan
- Atlanta (New 2018)

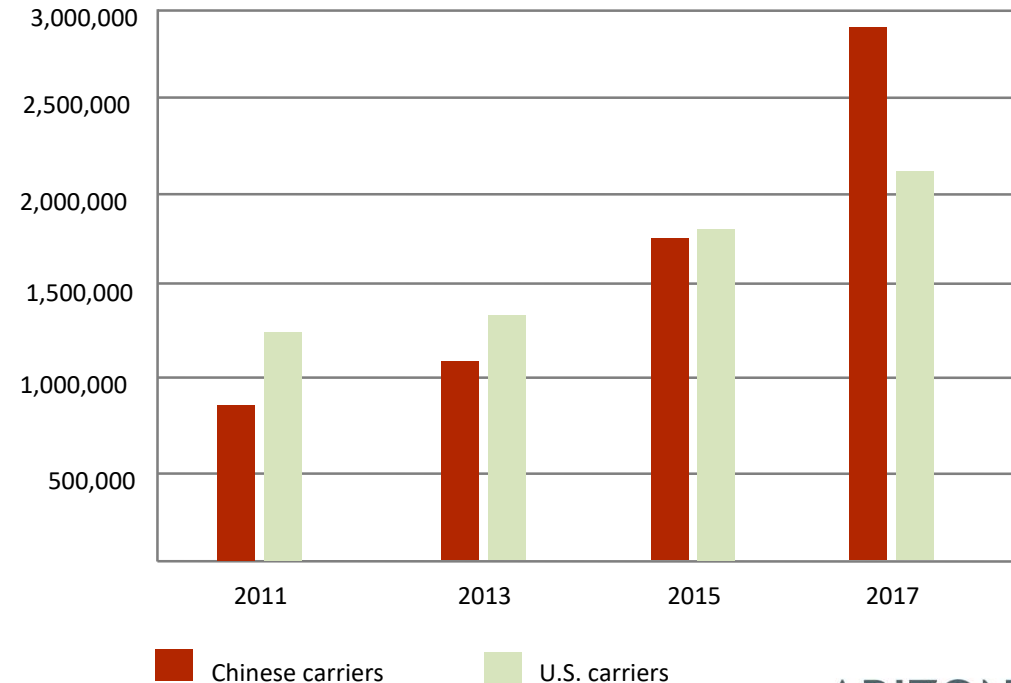
-Current annual seat capacity stands at 5,130,183 regularly-scheduled seats, a capacity jump of over 500,000 seats in the last 6 months alone

-China has 206 airports and is now building another 66 major new airports –a **32% increase** in number of airports in China in just the coming 5 years

China-USA Airlift Soaring

- Direct non-stop airlift between China and the USA has more than quadrupled in the last decade
- Chinese airlines have increased market share at the expense of U.S. airlines and now account for over 60% of annual seat capacity from China to the USA

ANNUAL SEAT CAPACITY



Source(s): Airlines

2017 -18 Key Trend-Mobile

CONTINUE SHIFTING TO MOBILE

- Mobile Internet: Increased number on mobile phone owners use their mobile to access the Internet from 685 million to 753 million people ; 50%+ 4G
- Mobile Payment: 87% of Chinese consumers used mobile payments in 2017, up from 69% in 2016; majority of new users come from 2nd and 3rd tier cities

MEDIA CONSUMPTION

- Dominant Channel: news and entertainment in China are primarily consumed on mobile
- TV: 71% of Chinese watch TV on their mobiles several times a day versus 27% in the U.S.
- News: phone-based news apps have become the #1 source of information for Chinese; social media is now the #2 source of information, mainly driven by WeChat which has over 1 billion registered users

MOBILE IN TRAVEL PURCHASE

- Travel search & planning: over half of destination search & planning is done on mobile
- Bookings: 72% of online bookings on Top 5 OTAs are done directly via mobiles; 81% of online hotel bookings are made on mobiles
- Booking apps: OTAs lead the way, with traditional TO/TAs playing catch up

2017 Online Booking& OTAs Update

GROWTH IS FOUND ONLINE:

- 20% growth in online purchases of travel in 2017 *New!!*
- Over \$800 billion in tourism products bought online in 2017 *New!!*
- Online tools are key in both the destination selection and actual booking
- Online platforms are the China outbound travel purchasing channels of the future

OTAs GAINING MARKET SHARE:

- 2018 Chinese New Year OTA bookings up 60% v. overall outbound market up 10%
- 3 OTAs dominate: C-Trip, Qunar and Tuniu--over 80%of China's OTA sector
- Air tickets (#2 after OTA booking) and accommodations (#3) are increasingly being booked on service providers' websites directly
- Fly & Drive and car rental are soaring in popularity

TRAVEL TRENDS



Booming FIT and Family Travel

China's FIT SEGMENT BOOMING

- Growing 10-20% per year, outperforming China's overall outbound market
- In certain States, FIT represents 40% of China travel and rapidly rising
- Semi-FIT (air/hotel packages) represents an additional 40% of the market

END of ONE-CHILD POLICY RESHAPING CHINA'S TRAVEL INDUSTRY:

- The new law has resulted in 8.83 million new-born second children in 2017
- 51% of all babies in 2017 were 2nd children for the first time ever
- Family travel is estimated to be up 168% in 2017
- 3-generation travel(Boomers, Millennial, Babies) booming
- ¼ of Chinese Millennial plan to travel with their parents and their children
- Even with children, 58% of Chinese travelers choose Fly & Drive options
- Educational tourism(family with college-age children) booming
- Theme park visitations with younger children benefiting from the trend

Powerful New OTAs Emerging

New OTAs Shaking Up the Travel Market_ *New!!*

- **Zuzuche.com** now dominates the online car rental market, going from 200,000 bookings to 4 million U.S. car rental bookings in less than 3 years
- **Fliggy.com** the online travel brand of e-commerce giant Alibaba, has gone from zero to 200 million users in less than 3 years and is now a key partner for many destinations
- **MaFengWo** the “TripAdvisor” of China launched in 2010 originally as a social travel website/blog, and has now transformed itself into a travel booking app which is key to reach Chinese FITs

MEDIA TRENDS



Social Media Channels in China *New!!*

- Most social media channels we are familiar with are blocked in China
e.g. Instagram, Facebook, Twitter, YouTube and Google
- In China, the people mainly use its own homegrown social media channels
e.g. Weibo(Twitter), WeChat (smart phone apps like Facebook), Youku(YouTube)
- Wechat, QQ, and Weibo are the top 3 social media platforms, with extraordinary penetration rates of 84%, 66%, and 39% of China's population, respectively.



WeChat

- WeChat, Tencent's take on WhatsApp, had more than 900 million active users worldwide by September 2017 and has become the top social media platform in China. Because of official censorship, Weibo is losing appeal as a forum where relatively uncensored news can be shared.



Weibo

- The primary platform to post news and is a great channel for users to connect with celebrities and brands; it has the highest engagement among trend-setters, with 150 million monthly active users across a wide demographic in China.

CHINA READY



Reduce the Barriers

- **Prepare a Destination Brochure, Video, Audio Guide in Chinese Language**
 - Shopping Center
 - Attractions
 - Tour activities/packages
 - Official Website_**New!!**
- **Upgrade WeChat into a new Level**
 - Official Chinese WeChat Account: increase followers; post destination information/updates_**New!!**
 - Use WeChat as a daily communication or interactive system with the Chinese travel trade/media partners
- **Payment System Trends_**New!!****
 - WeChat Pay and Alipay own the dominate market shares in China. They are expending the market shares into overseas. You can find them in the airport stores; attractions ticket boxes, even hotels and supermarkets in some short-haul destinations, such as Japan and Thailand.
 - No need to have a lot of cash while travelling overseas.
 - Brand promotions/discounts to drive the selling performance from time to time.

A Summary of Chinese Holidays

-Traditional Holidays (3 days and 7 days) in 2019

- New Year's Day: December 30,2018-January 1,2019
- Lunar New Year: February 4-10,2019_*Long-haul travelling season*
- Tomb Sweeping Day: April 5-7,2019
- Labor Day: April 29-May 1,2019_*Long-haul travelling season*
- Dragon Boat Festival: June 7-9,2019
- Mid-Autumn Festival: September 13-15,2019
- National Day: October 1-7,2019_*Long-haul travelling season*
- ✓ Chinese travelers usually takes 7 days plus annual leave for a long-haul destination travelling with friends or families.

-China School Breaks:

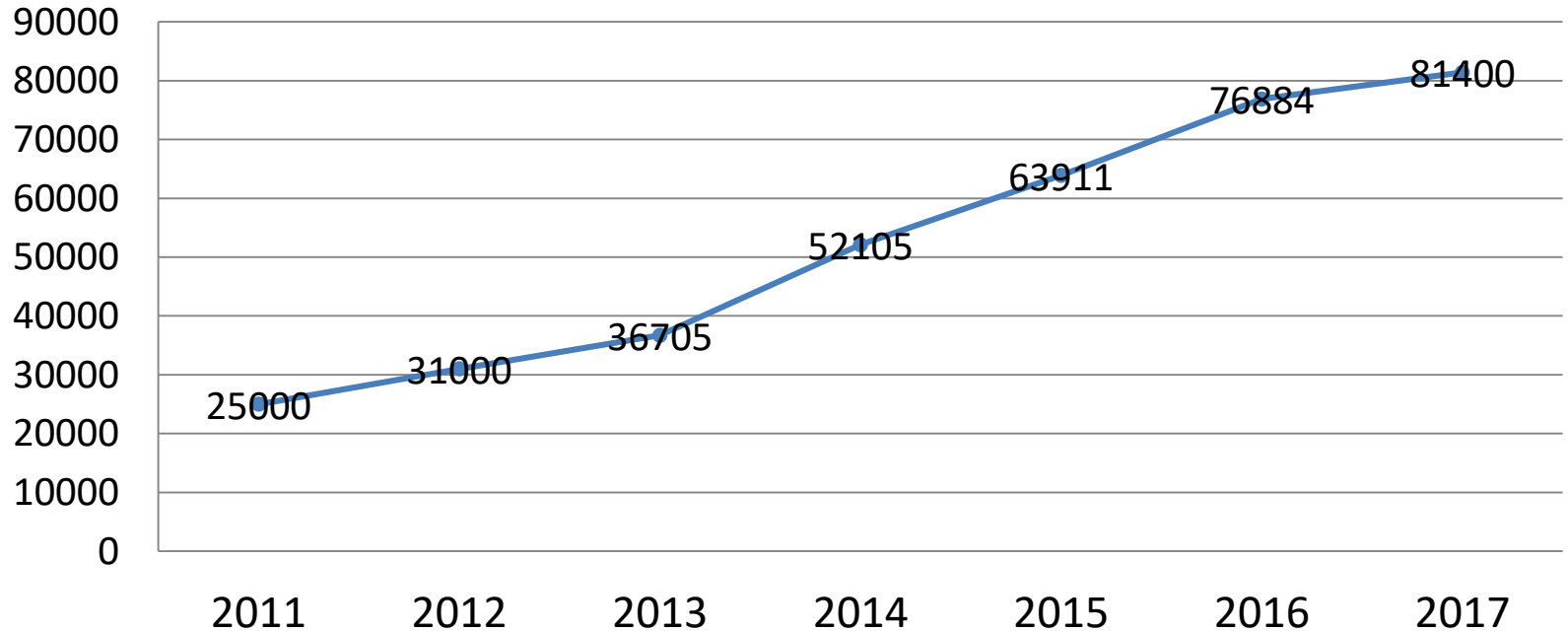
- Winter break: January 26- February 24,2019
- Summer break: July 13- August 31,2019
- ✓ Family travel and students camp(summer camp) high seasons

ARIZONA IN CHINA



GROWTH ON VISITATION

Visitation numbers*China



Arizona's advantages

What we are now selling.....

- Iconic views
- Clean & Fresh Air
- Western Style and Cowboy culture along Route 66
- Warm Seasonal Weather
- Less Crowdedness
- More safety
- Shopping
- In-depth travel experience

What we can add on.....

- Soft outdoor adventures to embrace the natures
- Road trip fun
- Family travel

•Continued New Product Developments

1) Key Travel Trade Partners

- Utour International Travel Service
- American International Travel Service
- Galaxy Tours
- Ctrip.com
- Caissa Touristic

•Marketing Co-operations

2) Ctrip Online Flagship Store

- Worked with Ctrip promoted the destination through landing page
- Social media: WeChat Content Marketing and Weibo EDMs to key selected clients

Total impression:1,428,025



2) Travel Trade/Media China Sales Mission_2018

- The China mission was hold in Shanghai, Beijing & Chengdu for one week at March 11-17.
- During the whole week, over 170 travel trade/media partners were invited to the luncheon for destination training and media interview.
- Separate to the luncheon, AOT met 7 top travel agencies in each market and 9 media appointments with key media partners.



China Sales Mission 2018 Media Track

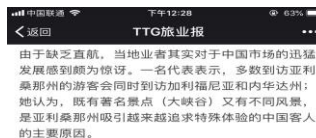


video
interview
in Shanghai &
Chengdu.



media meeting panels in
Shanghai & Beijing
for in-depth coverage opportunity.

Media Impressions
Generated: **7.2** million
AD Value: US\$ **0.5** million



亚利桑那州旅游局副局长Becky Blaine (右)

亚利桑那州旅游局副局长Becky Blaine说道，此次亚利桑那州旅游局重返中国，目的是向中国旅游行业进行动态更新，介绍亚利桑那州的国家公园、美丽的城市和西部小镇。亚利桑那州期待与中国旅游行业探索更多商务机遇，但更重要的是发展和巩固双边友谊。



打开优酷APP，流畅到起飞

美国亚利桑那州中国路演在波成功举办

1.4万次播放

高清 >

相关推荐

TCL亚运中国行—高级副总裁致辞

在美国亚利桑那州波科罗拉多士峡谷

1. *Journal of Management Studies*, 1997, 34, 1, 1-14.

◎ 38次播放



对于一个纯粹的旅行者来说，如果还来真正踏上亚利桑那州，却便不解完整的美国。被誉为“大峡谷之州”（Grand Canyon State）的亚利桑那州（Arizona），位于美国西部，毗邻墨西哥，东接新墨西哥州；南与墨西哥接壤并拥有世界上最长的国际边界线；西邻加利福尼亚州、内华达州和犹他州。这里有着最壮观的美国自然景观，也是北美最大的法定印第安人聚居部落，堪称誉为印第安人皮肤、柏柏尔文、皮夹克、阿帕切语、纳瓦霍族的居住地。而由277英里的“大峡谷”（Grand Canyon）亚利桑那州最具标志性的自然奇观，科罗拉多河自西南奔流而过，顺势劈向西方而去，而沿河谷一英里至数英里上方则矗立着一道道陡峭的岩石台，令人叹为观止。

If you never set foot in Arizona, you will never know America. Also known as the Grand Canyon State, Arizona, one of the four corner states, borders with New Mexico, Utah, Nevada, California and Mexico. The state also has one point in common with the southwest corner of Colorado. Arizona boasts the largest percentage of land designated as American Indian lands. There are 22 tribes in Arizona, the largest of which is the Navajo Nation. Arizona is known around the world for the Grand Canyon. This 277-mile long iconic, natural wonder is a steep-sided canyon carved out of the rock by the Colorado River, which flows through the canyon toward the southwest.

AEROSOL JOURNAL

3) Travel Trade/Media FAM Groups

-American Airlines Key Tour Operators Southern China FAM_ September 11-16,2017

-Post-IPW FAM_Travel Trade and Media FAM_May 24-30,2018



- IPW Post-fam: (as of July 11, 2018)

漫旅 TRAVEL+LEISURE



美西 亚利桑那之旅

亚利桑那州是美国西南部的一个州，以其壮丽的沙漠景观、古老的印第安文明遗迹和独特的自然风光而闻名。这里不仅有令人叹为观止的峡谷和山脉，还有丰富的野生动植物资源。从繁华的凤凰城到宁静的图森，从古老的普韦布洛遗址到现代化的城市建筑，亚利桑那州提供了多样化的旅游体验。

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BEYOND

在这天下布满着幽暗与星光的小城中，凝视着大空中散落的银河与月光，与内心的憧憬。

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30

返回 微博正文 ...

公开

旅行狮 5-28 23:52 来自iPhone X

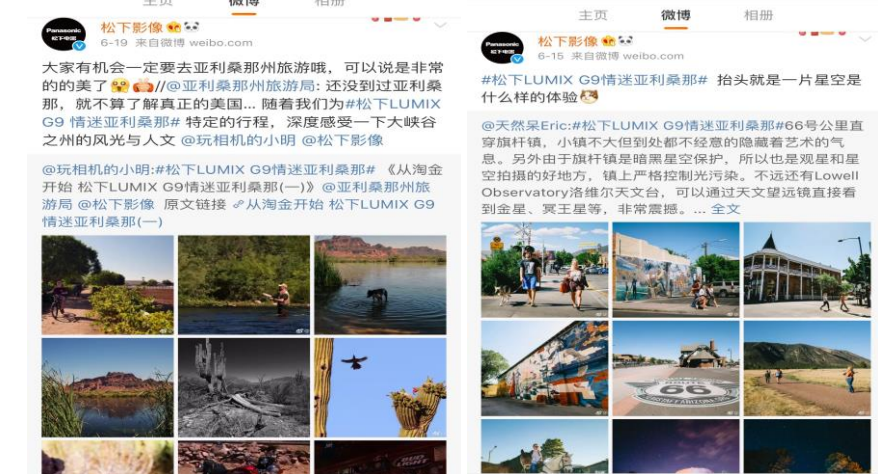
#绿色生活##乐活农场##敬畏大自然#
位于@亚利桑那州旅游局 Queen Creek(女王溪)Urban Farming——这些餐前蔬菜都在这个玻璃房的小花园培植出来，仅用1/10的土地就可以种出一英亩的蔬菜。

图中手中的蔬菜全是现场采摘试吃，这样就可以凑够午餐的前菜沙拉喇.....



FY18-AOT China-Cont'd

- Media Fam Group co-op with Panasonic LUMIX



FY18-AOT China-Cont'd

- Individual Media Visit
- Media Publicity: AD Value US\$ **0.5** million
- Number of Impressions: **0.8** million



Arizona Trail
阿利桑那山徑是美國最長的連續性山徑，全長超過1,000公里，橫跨美國西南部的亞利桑那州、新墨西哥州、猶他州及內華達州。這條山徑不僅是戶外愛好者的天堂，也是欣賞壯麗自然景觀的絕佳去處。從崎嶇的山巒到廣闊的沙漠，從清澈的溪流到繁茂的森林，阿利桑那山徑提供了無與倫比的自然體驗。





自然奇觀
在阿利桑那州的自然景觀中，自然形成的岩石拱門是一個令人驚嘆的奇觀。這些拱門是由風化和侵蝕作用形成的，為徒步旅行者提供了獨特的挑戰和壯麗的景觀。在這些拱門下穿行，可以感受到大自然的鬼斧神工。



2017 年度裝備+跑步，你全力以為了嗎

RUNNER'S

2018

傳承經典 超越自我

ASICS 亞瑟士 GEL-NIMBUS 跑鞋 20周年

你，是跑者

你的目標
“像飛翔”的成績
就是最好的證明。

前一季 新成就

新的一年，你的目標就是
跑得更快更遠。

光腳跑，不跑步

不給腳趾的腳部
太多負擔和壓力。
分散壓力。





紅岩奇觀
在阿利桑那州的自然景觀中，紅岩奇觀是一個令人驚嘆的奇觀。這些紅岩是由風化和侵蝕作用形成的，為徒步旅行者提供了獨特的挑戰和壯麗的景觀。在這些紅岩下穿行，可以感受到大自然的鬼斧神工。



沙漠奇觀
在阿利桑那州的自然景觀中，沙漠奇觀是一個令人驚嘆的奇觀。這些沙漠景觀是由風化和侵蝕作用形成的，為徒步旅行者提供了獨特的挑戰和壯麗的景觀。在這些沙漠景觀下穿行，可以感受到大自然的鬼斧神工。



Arizona Trail
阿利桑那山徑是美國最長的連續性山徑，全長超過1,000公里，橫跨美國西南部的亞利桑那州、新墨西哥州、猶他州及內華達州。這條山徑不僅是戶外愛好者的天堂，也是欣賞壯麗自然景觀的絕佳去處。



Saguaro National Monument
在阿利桑那州的自然景觀中，Saguaro National Monument是一個令人驚嘆的奇觀。這裡有大量的柱狀仙人掌，是徒步旅行者的天堂。在這些仙人掌下穿行，可以感受到大自然的鬼斧神工。



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Saguaro National Monument
在阿利桑那州的自然景觀中，Saguaro National Monument是一個令人驚嘆的奇觀。這裡有大量的柱狀仙人掌，是徒步旅行者的天堂。在這些仙人掌下穿行，可以感受到大自然的鬼斧神工。



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FY18-AOT China-Cont'd

- Off-line Media Publicity: AD Value US\$ **3.2** million
- Number of Impressions: **11** million



Northern Arizona: driving to the end of sunset 亚利桑那州北部 驰骋到日落的尽头

从第一缕阳光，到最后一抹晚霞，在广袤的亚利桑那州北部，你可以体验到最纯净、最壮观的日落美景。这里没有城市的喧嚣，没有车水马龙的拥挤，只有大自然的宁静与和谐。当你驾车行驶在蜿蜒的山路上，看着夕阳缓缓落下，将整个世界染成一片金红，你会感受到一种前所未有的宁静与美好。这就是亚利桑那州北部，一个让你忘记烦恼，尽情享受大自然馈赠的地方。

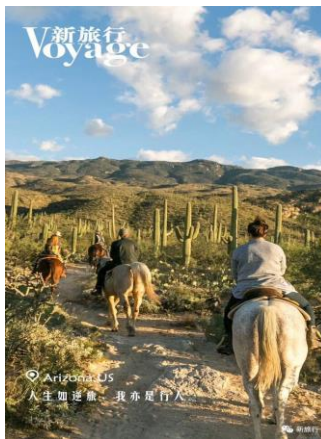


落日余晖 凤凰城/旗杆镇
Phoenix/Flagstaff
在亚利桑那州北部，你可以体验到最纯净、最壮观的日落美景。这里没有城市的喧嚣，没有车水马龙的拥挤，只有大自然的宁静与和谐。当你驾车行驶在蜿蜒的山路上，看着夕阳缓缓落下，将整个世界染成一片金红，你会感受到一种前所未有的宁静与美好。这就是亚利桑那州北部，一个让你忘记烦恼，尽情享受大自然馈赠的地方。



湖光山色 大峡谷/羚羊谷

在大峡谷/羚羊谷，你可以欣赏到壮丽的自然风光。这里有着独特的地质构造，色彩斑斓的岩层在阳光下显得格外迷人。当你漫步在这片神奇的土地上，你会感受到大自然的鬼斧神工，以及那份宁静与祥和。



Arizona US
人生如旅途，我亦愿行人

AMAZING THINGS 每月精选 IN November

01 美国亚利桑那州

热气球探索高空之美

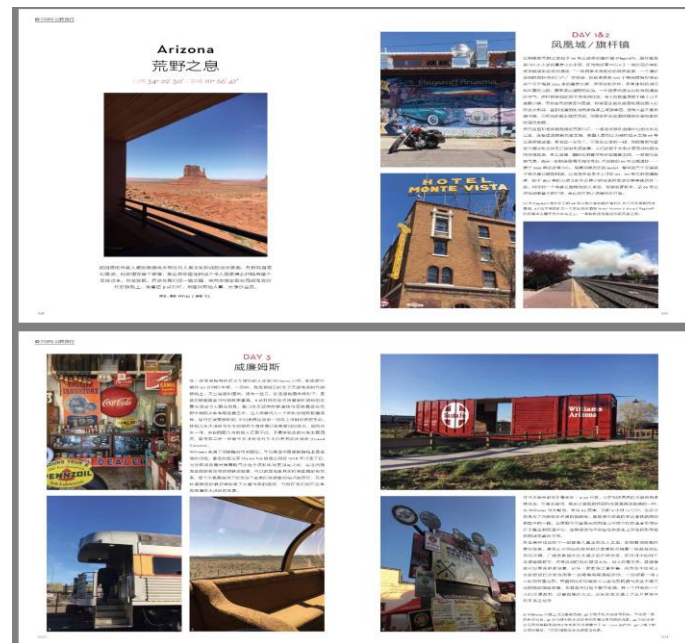
你可能已经体验过从空中俯瞰的壮观景象，或者乘坐热气球探索过沙漠。这可能是一种全新的方式，让你从高空去感受那份宁静与美好。热气球之旅不仅是一种休闲活动，更是一种探索自然的方式。当你缓缓升起，俯瞰着广袤的沙漠，你会感受到一种前所未有的宁静与美好。这就是亚利桑那州，一个让你忘记烦恼，尽情享受大自然馈赠的地方。

网站: www.visitarizona.com/see-and-don't-miss-trips-and-tours-hot-air-balloons



02

登上热气球
从地台
投掷



Arizona 荒野之息



在亚利桑那州北部，你可以体验到最纯净、最壮观的日落美景。这里没有城市的喧嚣，没有车水马龙的拥挤，只有大自然的宁静与和谐。当你驾车行驶在蜿蜒的山路上，看着夕阳缓缓落下，将整个世界染成一片金红，你会感受到一种前所未有的宁静与美好。这就是亚利桑那州北部，一个让你忘记烦恼，尽情享受大自然馈赠的地方。

DAY 153 凤凰城/旗杆镇



DAY 5 威廉姆斯



ARIZONA
OFFICE OF TOURISM

FY18-AOT China-Cont'd

- On-line Media Publicity: AD Value US\$ **1.7** million
- Number of Impressions: **100** million



进来，跟你讲一个84岁的美国老人
与“美国大街”的故事

自由不羁的T行侠 旅行者传媒 1月24日

TRAVELING MAKES DIFFERENCE
旅行改变世界



这是亚利桑那州一个名叫塞利格曼的小镇的下午，
一位穿着宽松牛仔外套、
戴着顶棒球帽的老人在夕阳中。

悦游CondeNastTraveler

一月的圣多娜



亚利桑那州的圣多娜 (Sedona) 以标志性的红岩石著称，又是一座艺术家聚集的小镇。一月，这里气候凉爽，处于淡季，最不可错过的原因还有这里是IDA认证的暗夜公园，小镇到了天黑之后会熄灭所有灯光，特别适合观赏星空，至于在星空下要做什么，你可以随意发挥啦。

微博正文

公开



iWeekly周末画报
6-13 08:30 来自微博 weibo.com

十关注

【iWeekly视野】美国亚利桑那州凤凰城，特技飞行员驾驶飞机连续绕过数个热气球。



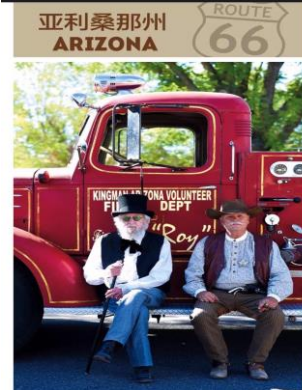
漫旅生活



10

山地精酿啤酒之路
波尔森-凤凰城
距离：4,441公里

啤酒狂信者的最爱——相比之下，那些寻访红酒酒庄的自驾之旅简直弱爆了——从蒙大拿一路喝到亚利桑那，沿途有着美国最棒的精酿啤酒和令人惊叹的红色岩山，还会有让你认为世界上只剩你一个人的沙漠公路。



ARIZONA
OFFICE OF TOURISM

Travel Blogger/Digital Influencers Engagement:
Total impressions are **24** million ; AD Value is US\$ **2.2** million



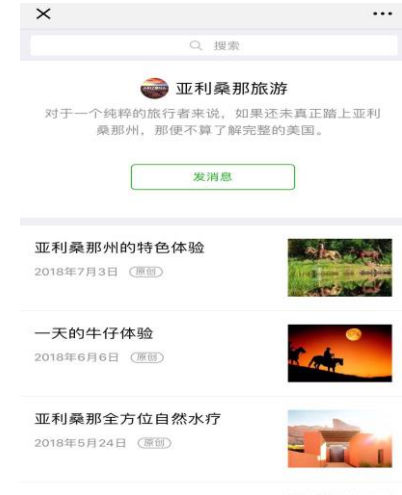
本公众所有文章均为原创
如需转载请与本人联系

FY18-AOT China-Cont'd

- AOT official Sina weibo: **62%** increase of followers in FY 18;
- Total **39,198** followers as of July 11, 2018;
- Year-to-date impressions are **1.3** million



- AOT official WeChat: Launched in March 2018 with bi-weekly posts every month, total attracted **1,803** followers
Year-to-date impressions are **12,491**



THANK YOU!

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